2009/10 NWT Aurora Visitor Survey Report

Industry, Tourism and Investment
Government of the Northwest Territories

Northwest Territories Industry, Tourism and Investment

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Introduction

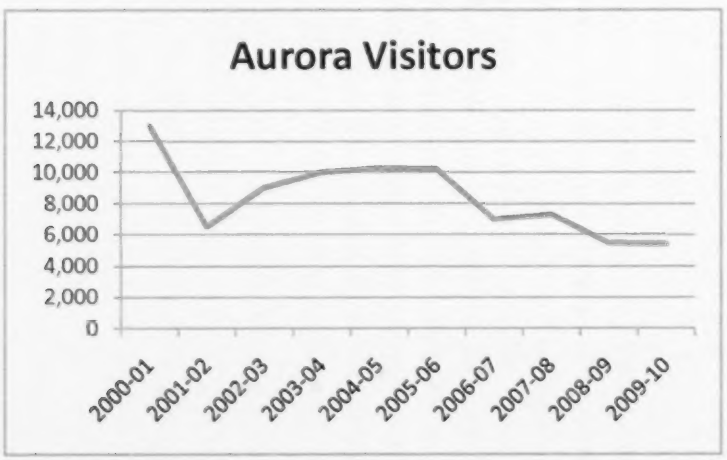
Aurora viewing is a major attraction in the Northwest Territories (NWT). Each year, thousands of visitors travel to the NWT between November and March to view the Northern Lights. While a variety of locations within the NWT offer Aurora viewing tours, Yellowknife receives the vast majority of these travellers, and is recognized worldwide as a premium Aurora viewing location.

The number of Aurora viewing travellers peaked in 2000/01 at 13,000 travellers, but declined dramatically in the years following 9/11. The NWT experienced a slow but steady increase in Aurora travellers, rising to just over 10,000 travellers in 2004/05. However, Aurora visits have declined in recent years due to increased competition from competing destinations, lack of infrastructure to handle direct international flights, an increase in costs associated with travel to the NWT and the global recession. It is estimated that 5,400 visitors travelled to the NWT to view the Aurora in 2009/10 – a 1% decline from the previous year. Figure 1 shows the annual estimated visitation for Aurora viewing, along with annual estimates for various other NWT visitor segments.

Figure 1: Annual Visitation Estimates

Northwest Territories Visitation										
Visitor Segment	**2000/01**	**2001/02**	**2002/03**	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**2008/09**	**2009/10**
Visiting Friends and Relatives	6,126	6,175	7,410	7,599	7,780	8,942	9,025	11,693	9,261	12,910
Hunting	1,300	1,400	1,380	1,117	1,279	1,308	1,216	984	942	757
Aurora Viewing	13,000	6,500	9,000	9,990	10,245	10,200	7,000	7,297	5,460	5,400
Outdoor Adventure	1,480	1,552	1,965	1,841	1,725	2,171	2,079	2,125	2,098	1,853
Fishing	8,611	8,534	8,137	7,759	7,521	7,216	7,726	7,470	7,274	6,403
General Touring	9,251	11,443	15,205	15,219	14,199	13,324	13,340	15,123	14,760	14,500
Total Leisure Visitors	39,768	35,604	43,097	43,526	42,750	43,161	40,386	44,692	39,795	41,823
Business Travellers	16,876	18,313	19,014	20,725	22,591	24,642	35,509	34,880	33,624	26,181
Total Visitors	**56,644**	**53,917**	**62,111**	**64,251**	**65,340**	**67,803**	**75,895**	**79,572**	**73,419**	**68,004**

Figure 2: Annual Aurora Visitation Estimates



Survey Methodology

A self-administered paper survey instrument was used to collect responses from Aurora tourists. This survey was developed for the 2006/07 season. It was originally created in English but was translated into Japanese.

Surveys were distributed through the primary Aurora viewing tour operator based in Yellowknife. A total of 1,788 completed surveys were collected. A pin was given to all participants as an incentive.

The 2009/10 Aurora Visitor Survey was conducted from November 2009 to March 2010, covering the typical Aurora viewing season.

Executive Summary

During the 2009/10 Aurora viewing season, approximately 5,400 visitors travelled to the NWT to view the Aurora. The primary Aurora viewing tour operator reports that the majority of these travellers originated from Japan and primarily visited the Yellowknife area. The survey found that a large proportion of Aurora travellers were female (66%), and averaged 36 years of age (64% were between the ages of 21 and 40). The majority of Aurora travellers had a college or university degree or higher (62%). The occupations most commonly reported by Aurora visitors included "student" (16%) and "professional" (12%). Approximately 60% of those who responded reported an annual income of $50,000 or less.

The average length of stay for Aurora travellers was 3.4 nights, with 65% of the travellers staying for three nights. Most Aurora travellers (59%) travelled in groups of two.

Overall, Aurora travellers rated "well known for Aurora viewing" as the most important consideration when deciding to visit Yellowknife (4.7 out of 5). Other important considerations included "cost of package tours" (3.7 out of 5), and "variety of tours available" (3.0 out of 5). The most common place for Aurora travellers to hear about the NWT as a vacation destination was through a travel agent (38%). Friends or family were the second most common source of information (33%), while the Internet (26%) and television (19%) were also fairly common. Overall, Yellowknife was very favourably viewed by the majority of Aurora travellers – 65% rated the city a 4 or 5 out of 5 in terms of overall satisfaction.

Approximately 5% of Aurora travellers indicated they had visited the NWT on at least one previous occasion, while another 8% of Aurora travellers had visited other Aurora viewing destinations in the past, including Finland (3.2%) and Alaska (2.1%). When asked to identify any other destinations to which they would have travelled had they not visited the NWT, Aurora travellers identified a variety of locations, including Northern Europe (9.6%), Alaska (9.3%), Finland (6.5%) and the Yukon (4.8%). A large proportion of Aurora travellers who visited the NWT in 2009/10 also visited other Canadian locations, including Vancouver (24%) and Niagara Falls (21%).

In 2009/10, approximately 76% of Aurora travellers were able to view the Aurora while they were in the NWT. The success rate rose from 76% for those staying two nights or less to 82% for those who stayed for three nights or more. Overall, travellers rated their Aurora viewing experience an average of 3.5 out of 5. Only 24% rated their experience as having exceeded their expectations (5 out of 5), as compared to the 2006/07 Aurora viewing season where the average rating was a 4.1 out of 5 and 42% rated their experience 5 out of 5. However, the success rate of seeing the Aurora in 2006/07 was much higher. In 2006/07, 91% of Aurora tourists saw the Aurora.

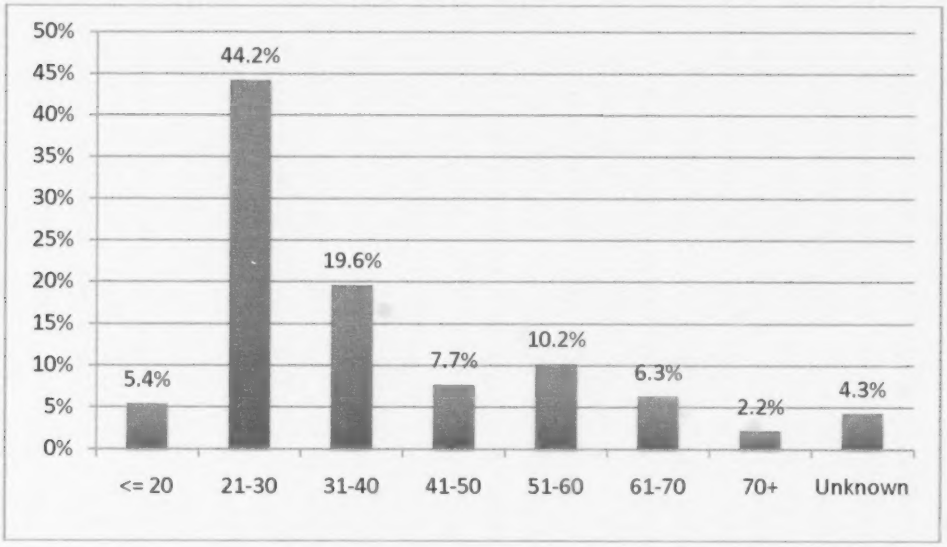
Aurora travellers participated in a variety of activities while in the NWT, including shopping (80%), town tours (72%), and photography (70%). The activities Aurora travellers were most satisfied with were dogsledding (4.6 out of 5) and snowmobiling (4.1 out of 5). Approximately 38% indicated that there were activities they had wanted to participate in, but did not get the opportunity to, such as flightseeing/wildlife viewing, snowshoeing, snowmobiling, dogsledding arts and crafts, and ice fishing. Aurora travellers were also asked to rate the various services, products and infrastructure they encountered while in the NWT. Overall, the highest rated services included 'cleanliness of towns' (3.72), 'visitor centres' (3.61) and 'restaurants' (3.47). The lowest rated services included 'hotels/motels' (3.35) and 'airports' (3.22).

On average, Aurora travellers spent approximately $287 per person while in the NWT. Of that total, they spent the most on optional tours (approximately $252 per person) and the least on traditional arts and crafts ($74 per person) and groceries ($36 per person).

Age

The average age of Aurora visitors was 36 years old. However, 44% of Aurora visitors were between the ages of 21 and 30.

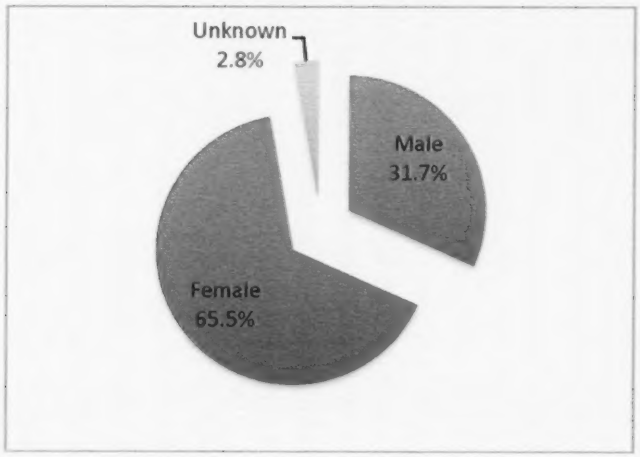
Figure 3: Age



Gender

Overall, the majority of Aurora visitors were female (65.5%). Just under one-third (31.7%) of the respondents were male.

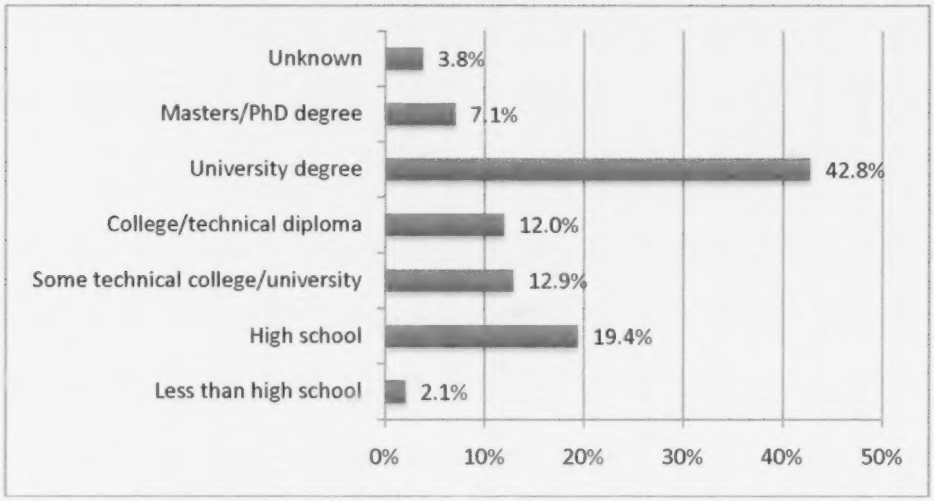
Figure 4: Gender



Education

Almost 62% of respondents reported having a college or university degree or higher, while another 13% reported having completed at least some college or university. High school was the highest level of education for 19% of respondents.

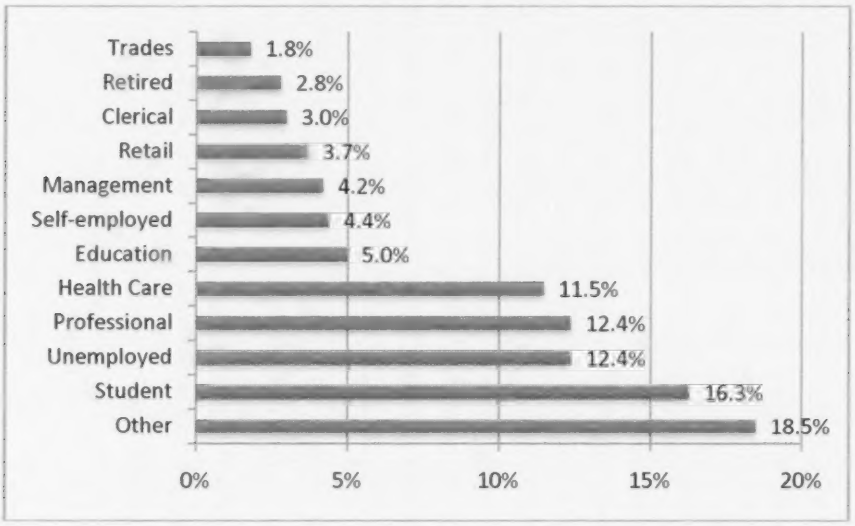
Figure 5: Education



Occupation

Two categories emerged as the primary occupations for Aurora visitors: student (16.3%) and professional (12.4%). However, 18.5% of respondents indicated "Other" as their primary occupation, which most commonly included office worker/company employee, housewife or service industry. Another 12.4% were unemployed.

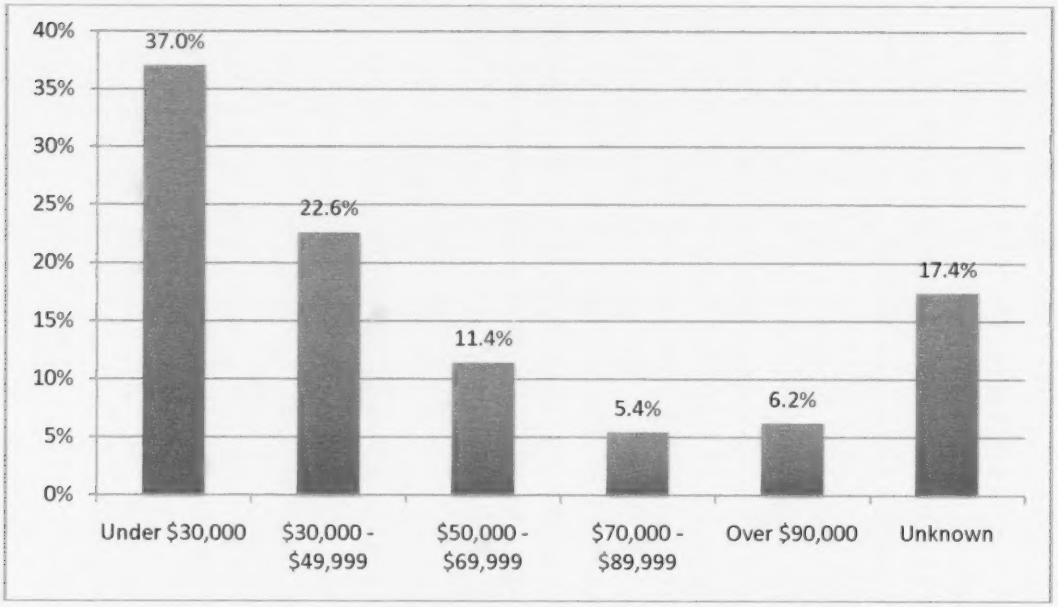
Figure 6: Occupation



Income

Of those that responded, approximately 60% reported having an annual income of less than $50,000. However, a large proportion of respondents (17.4%) did not report their income.

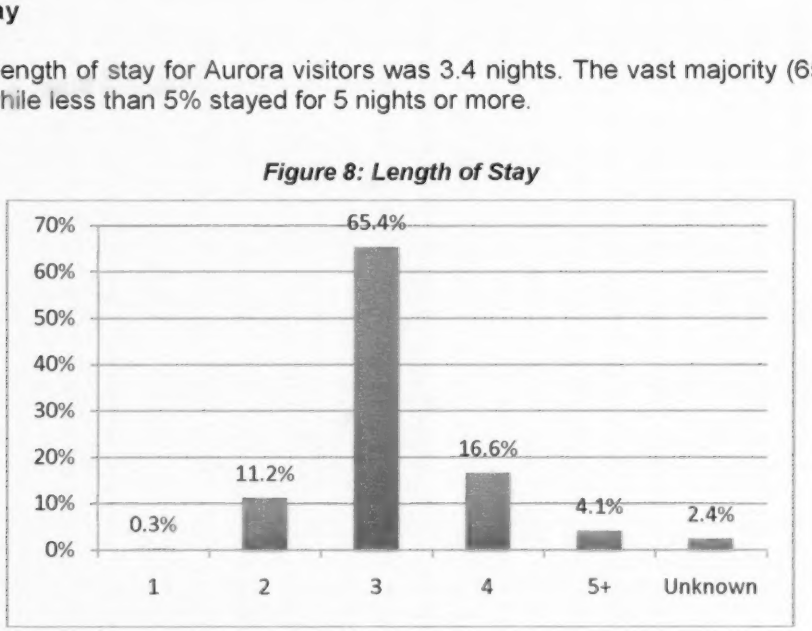
Figure 7: Income



Length of Stay

The average length of stay for Aurora visitors was 3.4 nights. The vast majority (65.4%) stayed for 3 nights, while less than 5% stayed for 5 nights or more.

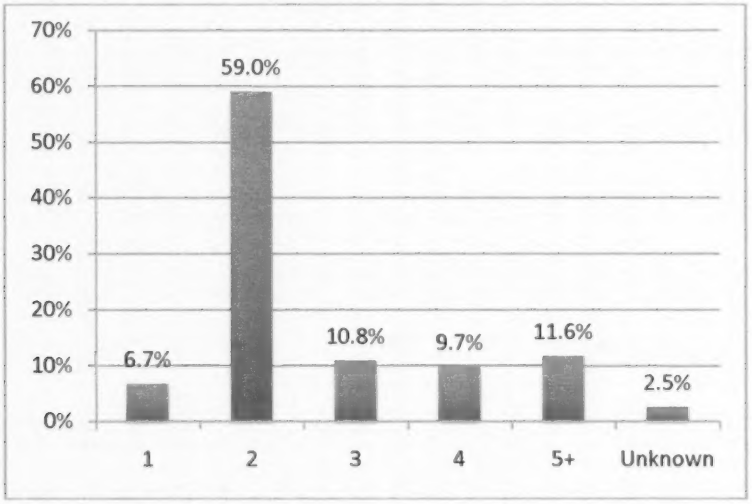
Figure 8: Length of Stay



Party Size

The majority of Aurora visitors travelled in pairs (59%).

Figure 9: Party Size



Previous Vacations

Respondents were asked several questions regarding their travel for Aurora viewing vacations. More than 5% indicated that they had previously travelled to the NWT. While the majority of those that said they previously travelled to the NWT did so only once, a small proportion (approximately 1.8%), indicated they had made multiple trips to the NWT in the past.

For those who said they had previously travelled to other Aurora viewing destinations (7.9%), destinations travelled to included Finland (3.2%), Alaska (2.1%), Scandinavia (1.3%) and Yukon (0.6%). Other destinations included Greenland, Iceland or Northern Alberta. While not specifically asked, many respondents reported they had travelled to multiple Aurora viewing destinations in the past.

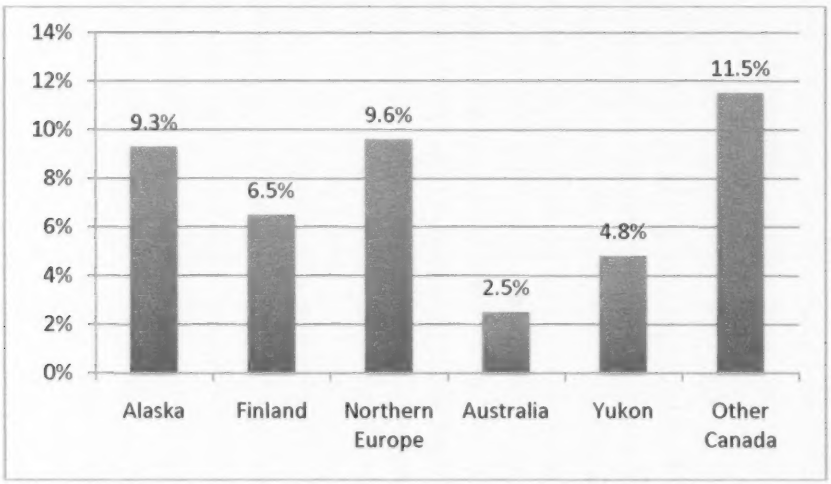
Figure 10: Previous Aurora Viewing Travel

	Percent
Previously travelled to NWT	5.4%
Previous travel to other Aurora viewing destinations (Includes travel to multiple destinations)	7.9%
Finland	3.2%
Alaska (Fairbanks)	2.1%
Scandinavia (Sweden, Norway, Denmark)	1.3%
Yukon (Whitehorse)	0.6%
Other (Greenland / Iceland / Alberta etc...)	1.6%

Alternate Vacation Destinations

When asked to indicate where they would have gone if they had not come to Yellowknife to view the Aurora, the most common destinations included other Canadian destinations (Northern Alberta, Vancouver) (11.5%), Northern Europe (9.6%), Alaska (9.3%), Finland (6.5%), the Yukon (4.8%), and Australia (2.5%).

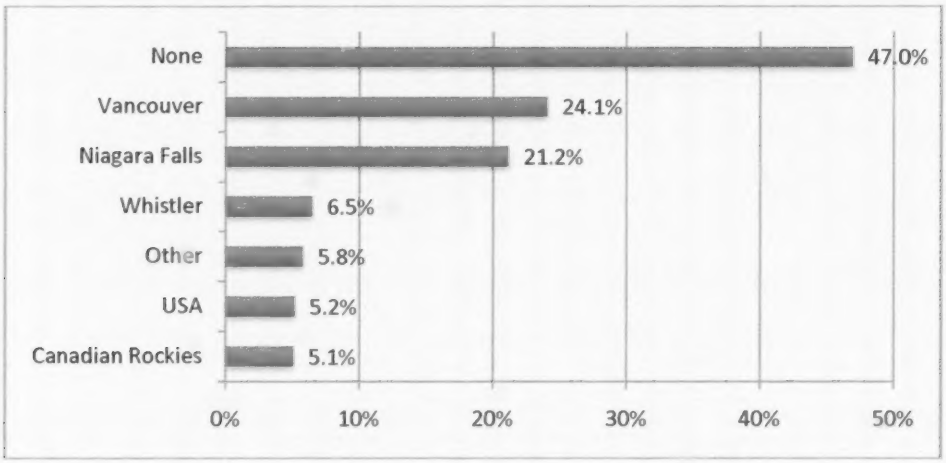
Figure 11: Alternative Aurora Viewing Destinations



Other Destinations Visited

Approximately 47% of Aurora viewing travellers did not visit any other destination during their trip to the NWT. Just over a fifth (21%) reported that they had also visited Niagara Falls while on their current trip. Twenty four percent indicated they travelled to Vancouver and almost 7% travelled to Whistler, British Columbia. Fewer than 6% reported travelling to the United States or Banff / Rocky Mountains while on their current trip.

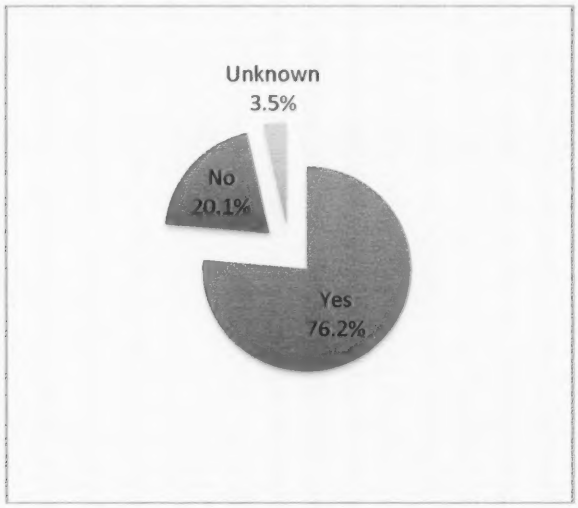
Figure 12: Other Destinations Visited on Current Trip



Aurora Viewing Success

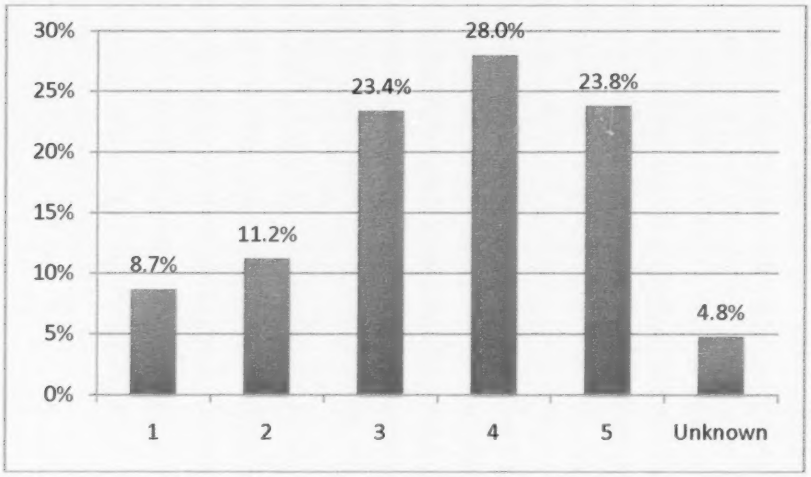
Aurora travellers were asked several questions regarding their Aurora viewing experience. Overall, 76% of respondents indicated they had seen the Aurora on their current trip, but 20% said they had not seen the Aurora. However, the success rate for those who stayed for three nights or longer rose to 82%.

Figure 13: Did you see the Aurora on this trip?



Just over half of the respondents rated their Aurora viewing experience a 4 or better on a 5 point scale where 1 indicates that the experience did not meet their expectations and 5 indicates that it exceeded their expectations. Nearly 20% of Aurora tourists rated their Aurora experience below a 3. Overall, the average rating was 3.5 out of 5.

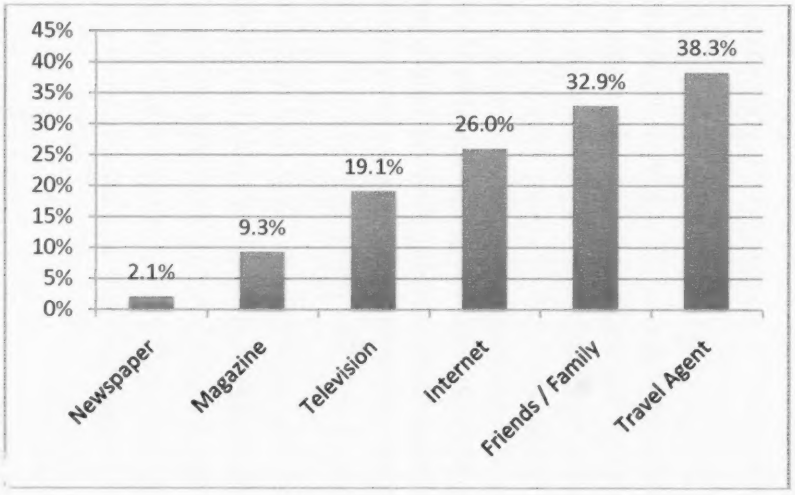
Figure 14: Rating – Aurora Viewing Experience



Source of Information

Respondents were asked to indicate from what source they had heard about the NWT. Almost 40% indicated they had heard about the NWT from a travel agent and 33% indicated they heard about the NWT from friends or family. Internet (26%) and television (19%) were also common sources of information used by Aurora travellers.

Figure 15: How did you hear about the NWT as a place to visit?



Reason for choosing to visit the Northwest Territories

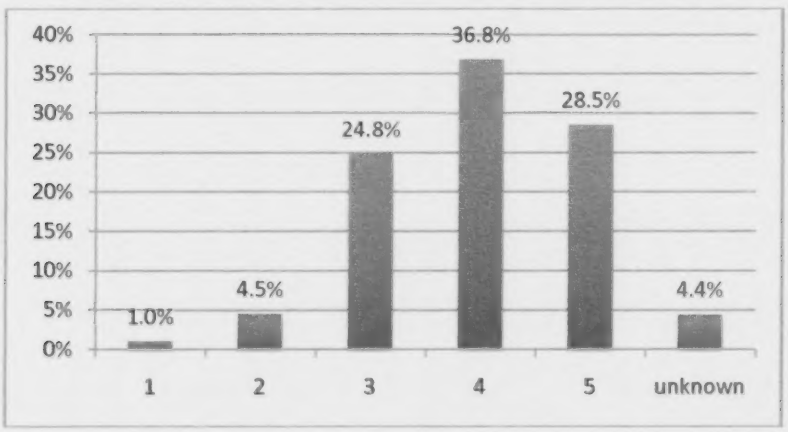
Respondents were asked to rate several items on how important they were in their decision to choose Yellowknife as their Aurora viewing destination. Based on a 5 point scale, where 1 represents not very important and 5 represents very important, over 90% of respondents rated "well known for Aurora viewing" a 4 or 5 out of 5 for why they chose Yellowknife as their Aurora viewing destination. "Cost of package tour" received an average rating of 3.8 out of 5, while "variety of tours" was rated an average of 3.0 out of 5. "Unique culture" and "recommended by friends/family" received the lowest average ratings of approximately 2.9 out of 5.

Figure 16: When choosing Yellowknife as an Aurora viewing destination, how important were the following considerations?

Yellowknife Rating

Aurora viewing travellers were asked to rate Yellowknife as a vacation destination overall. Based on a 5 point scale, where 1 represents Very Poor and 5 represents Excellent, Yellowknife achieved an average rating of 4.0 out of 5 (and the most common rating was 4 out of 5).

Figure 17: Rating – Yellowknife as a Vacation Destination



Return visit

When asked whether they would consider returning to Yellowknife at another time, over 87% of Aurora travellers indicated they would, while 12% said they would not consider returning to Yellowknife again. Of those who said they would return, 56% said they would like to return during the summer, while 37% said they would like to return again during the winter.

Figure 18: Would you visit Yellowknife again?

	Percent
Yes	87.3%
Winter	37.2%
Summer	55.5%
No	12.6%
Unknown	0.8%

Other Activities

Respondents were asked to indicate how satisfied they were with any activities they may have participated in while on their current trip, aside from Aurora viewing. Overall, the activities most commonly participated in included shopping (80.1%), town tours (71.8%), photography (69.9%) and dogsledding (53.8%). Based on a 5 point scale where 1 represents "Not very satisfied" and 5 represents "Very Satisfied", the activities with the highest average satisfaction ratings included dogsledding (4.6), snowmobiling (4.1), photography (3.9) and snowshoeing (3.9).

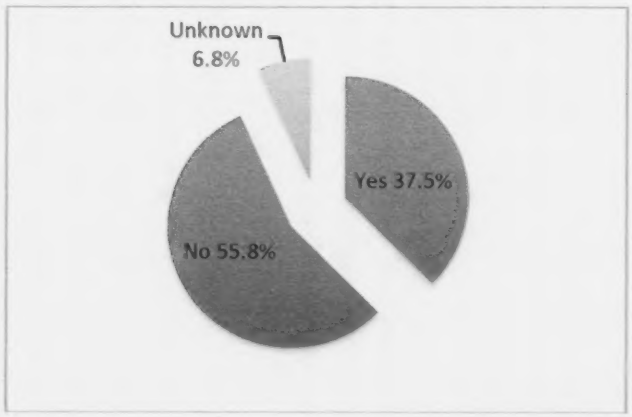
Figure 19: Activity Participation / Rating

Activity	Participation	Average Satisfaction Rating
Shopping	80.1%	3.2
Town Tour	71.8%	3.5
Photography	69.9%	3.9
Dogsledding	53.8%	4.6
Museum Visit	53.2%	3.6
Cultural Event	38.8%	3.5
Snowshoeing	28.0%	3.9
Snowmobiling	11.0%	4.1
Flightseeing	6.8%	3.2
Skiing	2.0%	3.4
Skating	4.0%	3.1
Swimming	2.9%	3.2

Unavailable Activities

Respondents were asked to list any activities they had hoped to participate in while they were in the NWT, but did not get the opportunity while they were here. Approximately 38% of respondents indicated they had not been able to participate in certain activities, including flightseeing/wildlife viewing, snowshoeing, snowmobile tours, dogsled tours, ice fishing and arts and crafts.

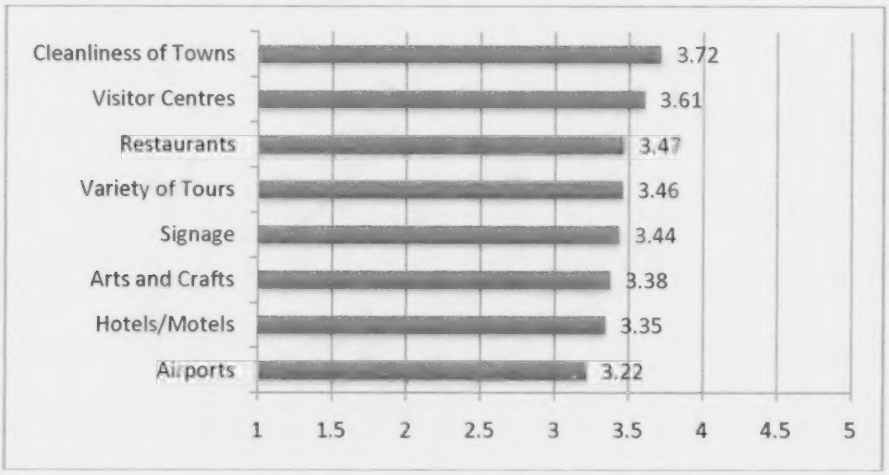
Figure 20: Were there any activities that you hoped to do that were not available?



Infrastructure Ratings

Aurora travellers were asked to rate their satisfaction with various products, services, or infrastructure they may have encountered while in the NWT. Overall, cleanliness of towns (3.72) and visitor centres (3.61) were rated the highest. The lowest rated services, products and infrastructure were hotels/motels (3.35) and Airports (3.22).

Figure 21: Rating – Services, Products, Infrastructure



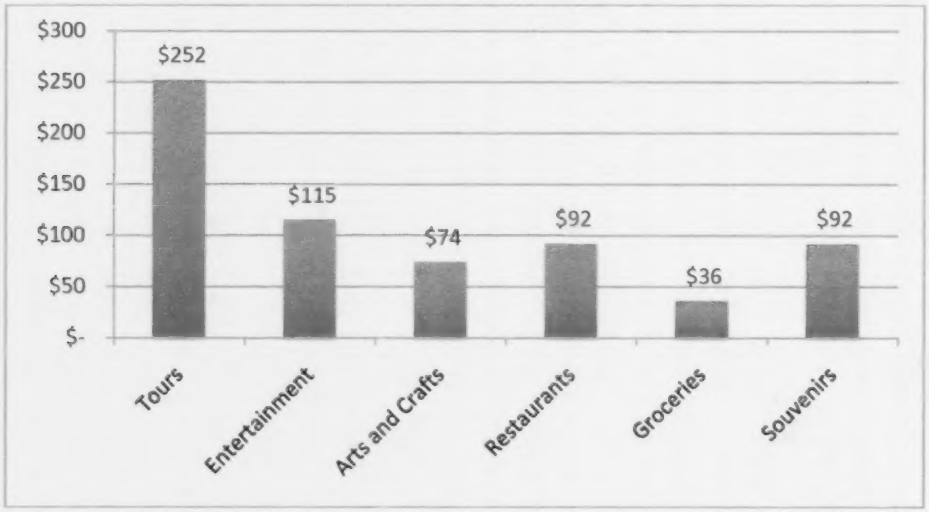
Trip Expenditures

Spending by Aurora travellers was organized into six general expenditure categories. Figure 22 shows the average per person expenditure for each of the categories.

Additional tours which are not typically part of the original Aurora viewing package (dogsledding, snowmobiling, etc.) were the largest expenditure category at approximately $252 per person. This was followed by entertainment at $115 per person. Aurora travellers also spent an average of $92 each on souvenirs and restaurant dining. They spent approximately $74 per person on arts and crafts which typically refers to local goods such as prints or carvings.

Overall, Aurora travellers spent an average of $287 per person while in the NWT during the 2009/10 Aurora viewing season.

Figure 22: Average expenditures



Outliers

Some responses were removed from analysis because they violated certain acceptable parameters. The following is an explanation of how outliers were identified and removed.

Tours: Anyone who spent over $700 in three days on tours was removed from analysis. Anyone who stayed over three days but spent over $1,000 was also removed. This was done to prevent responses that included accommodations or airfare from being included in the analysis.

Entertainment: Anyone who spent over $500 in three days was removed from analysis. Likewise, anyone who spent more than $1,000 in three or more days was also removed.

Restaurants: Responses of more than $100 a day were removed.

Groceries: Responses of more than $50 a day were removed.

Souvenirs: Responses of $500 or more were removed.